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Form 990-PF

Department of the Treasury

Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

2009

OMB No 1545-0052

For calendar year 2009, or tax year beginning , and ending G Check all that apply: Initial return Initial return of a former public charity Final return Amended return Address change Name change Name of foundation A Employer Identification number Use the IRS label. Otherwise, JAMES R. AND BRONNIE L. BRASWELL 73-6339730 Number and street (or P O box number if mail is not delivered to street address) print Room/suite B Telephone number or type. 300 EAST WADE STREET (704) 694-5515 See Specific City or town, state, and ZIP code C if exemption application is pending, check here Instructions. WADESBORO, NC 28170 D 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation X Section 501(c)(3) exempt private foundation H Check type of organization: Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation If private foundation status was terminated I Fair market value of all assets at end of year | J Accounting method: X Cash under section 507(b)(1)(A), check here (from Part II, col. (c), line 16) Other (specify) F If the foundation is in a 60-month termination 12,880,945. (Part I, column (d) must be on cash basis.) ▶\$ under section 507(b)(1)(B), check here Part | Analysis of Revenue and Expenses (d) Disbursements for chantable purposes (cash basis only) (a) Revenue and (c) Adjusted net (b) Net investment (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) expenses per books ıncome N/A Contributions, gifts, grants, etc., received 2 Check X if the foundation is not required to attach Sch. B Interest on savings and temporary cash investments 57,892. 57,892 STATEMENT 261,382. 253,438 Dividends and interest from securities STATEMENT 5a Gross rents b Net rental income or (loss) 345,683 6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 2 11 3,103,286. 345,683 7 Capital gain net income (from Part IV, line 2) Net short-term capital gain Income modifications 10a Gross sales less returns and allowances b Less Cost of goods sold c Gross profit or (loss) 11 Other income 664,957 657,013 12 Total. Add lines 1 through 11 13,946. 13 Compensation of officers, directors, trustees, etc. 0. 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees 4,550. STMT 0 **b** Accounting fees 0. 57,796. STMT c Other professional fees 57,776 0. 17 Interest STMT 5 3,439 3,439 Ō. 18 Taxes 19 Depreciation and depletion 20 Occupance CEIVED
21 Travel, conferences, and meetings 22 Printing and publications 23 Other penser B 1 9 2010 24 Total operating and administrative expenses. Add tines 13 through 23 79,731. 61,215 25 Contributions, grit 712,500. 712,500. Total expenses and disbursements. 792,231 61,215 Add lines 24 and 25 712,500. 27 Subtract line 26 from line 12: -127,2744 Excess of revenue over expenses and disbursements 595,798 b Net investment income (if negative, enter -0-) C Adjusted net income (if negative, enter -0-) N/A

Б	art	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End o	
	ai L	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	53,895.	31,906.	31,906.
	2	Savings and temporary cash investments	1,469,512.	864,025.	864,025.
	3	Accounts receivable			
		Less: allowance for doubtful accounts			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
	ļ	disqualified persons .			
	7	Other notes and loans receivable		· · · · · · · · · · · · · · · · · · ·	
		Less: allowance for doubtful accounts			
ţ	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
Ÿ	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock			
	c	Investments - corporate bonds	· · · · · · · · · · · · · · · · · · ·		
	11	Investments - land, buildings, and equipment basis			1
	l	Less accumulated depreciation	235,000.		
	12	Investments - mortgage loans			
	13	Investments - other STMT 6	10,511,759.	11,246,961.	11,985,014.
	14	Land, buildings, and equipment basis	<i></i>	5.48.5	
		Less accumulated depreciation			
	15	Other assets (describe ▶)			
_	16	Total assets (to be completed by all filers)	12,270,166.	12,142,892.	12,880,945.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
8	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
ap	21	Mortgages and other notes payable			, *
	22	Other liabilities (describe >)			
	ŀ		_	_	
_	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here			• .
s		and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted		18.1	
alar	25	Temporarily restricted			
Net Assets or Fund Balance	26	Permanently restricted			
Ĕ		Foundations that do not follow SFAS 117, check here			
P	l	and complete lines 27 through 31.	10 070 166	10 140 000	
ts	27	Capital stock, trust principal, or current funds	12,270,166.	12,142,892.	
SSE	Ι.	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Ž	29	Retained earnings, accumulated income, endowment, or other funds	0.	10 140 000	
ž	30	Total net assets or fund balances	12,270,166.	12,142,892.	
		-	12 270 166	10 140 000	
	31	Total liabilities and net assets/fund balances	12,270,166.	12,142,892.	
P	art	III Analysis of Changes in Net Assets or Fund B	alances		
=	Tota	I not accepte on friend halospees at harrisona of year. Part II. column (a) line	20		
		I net assets or fund balances at beginning of year - Part II, column (a), line	30		10 070 166
	•	st agree with end-of-year figure reported on prior year's return)		1	$\frac{12,270,166.}{-127,274.}$
		r amount from Part I, line 27a r increases not included in line 2 (itemize)		2	$\frac{-127,274.}{0.}$
		lines 1, 2, and 3		3	12,142,892.
		eases not included in line 2 (itemize)	•	· ·	12,142,692.
		I net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	nlumn (h) line 30	5	12,142,892.
		inot account of forthe balances at one of year (line 4 millios line 3) - f art II, et	// IIII (U), IIIIU UU	0	,,

			nvestment						
•		ribe the kind(s) of property sold (e.g arehouse; or common stock, 200 sh			(b) Ho P - F D - I	w acquired Purchase Donation	(c) Date (mo., c	acquired lay, yr.)	(d) Date sold (mo., day, yr.)
1a REA	L ESTATE -	FRANKLIN COUNTY	TENNES	SEE		D	12/3	1/99	02/27/09
b REA	L ESTATE -	LANCASTER COUNTY	SOUTH						
	OLINA					D	12/3	1/99	05/12/09
		NT-SEE ATTACHED				P	VARI	OUS	VARIOUS
e CAP	ITAL GAINS	DIVIDENDS							
(e) (Gross sales price	(f) Depreciation allowed (or allowable)	1	st or other basis expense of sale				iain or (loss s (f) minus	
<u>a</u>	385,254.			231,82	0.				153,434.
b						-			
C	12,500.			35,94					-23,445.
d	2,650,000.			2,489,83	8.				160,162. 55,532.
е	55,532.		<u> </u>						55,532.
Comple	te only for assets showing	ng gain in column (h) and owned by	the foundation	on 12/31/69				Col. (h) gain	
(i) F.N	1.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (1) col. (j), if any		C		not less tha (from col. (
a					\neg				153,434.
b									
C									-23,445.
d									160,162.
е									55,532.
2 Capital g	pain net income or (net ca	If gain, also ente			}	2			345,683.
3 Not char	t-term canital dain or (lo	ss) as defined in sections 1222(5) a						<u> </u>	· · · · · · · · · · · · · · · · · · ·
	ilso enter in Part I, line 8,		iiu (o).						
If (loss),	enter -0- in Part I, line 8	•				3		N/A	
Part V	Qualification U	Inder Section 4940(e) for	r Reduced	Tax on Net	Inve	stment In	come		
/For ontions	luga bu damastia privat								
(1 or obtione	n use by domesuc privati	e foundations subject to the section	4940(a) tax on	net investment in	come.)				
		•	4940(a) tax on	net investment in	come.)				
	940(d)(2) applies, leave t	•	4940(a) tax on	net investment in	come.)				
If section 49	940(d)(2) applies, leave t	•			·			-	Yes X No
If section 49 Was the fou	940(d)(2) applies, leave t indation liable for the sec foundation does not qua	his part blank. tion 4942 tax on the distributable an lify under section 4940(e). Do not co	nount of any ye	ear in the base peri	od?			-	Yes X No
If section 49 Was the fou	940(d)(2) applies, leave t indation liable for the sec foundation does not qua	his part blank. tion 4942 tax on the distributable an	nount of any ye	ear in the base peri	od?			-	
If section 49 Was the fou	940(d)(2) applies, leave to indation liable for the section does not quate appropriate amount in	his part blank. tion 4942 tax on the distributable an lify under section 4940(e). Do not co each column for each year; see instr	nount of any ye omplete this pa ructions before	ear in the base per irt. making any entrie	od?			Distrit	(d)
Was the found for "Yes," the Tenter the	940(d)(2) applies, leave to indation liable for the sect foundation does not quate appropriate amount in (a) Base period years year (or tax year beginni	his part blank. tion 4942 tax on the distributable an lify under section 4940(e). Do not co each column for each year, see instr (b) Adjusted qualifying dis	nount of any ye omplete this pa ructions before stributions	ear in the base per irt. making any entrie Net value of noi	od? s. (c)	able-use asset		Distrit (col. (b) div	(d) button ratio vided by col. (c))
Was the found for "Yes," the Tenter the	940(d)(2) applies, leave to indation liable for the section foundation does not quate appropriate amount in (a) Base period years	his part blank. tion 4942 tax on the distributable an lify under section 4940(e). Do not co each column for each year; see instr (b) Adjusted qualifying dis	mount of any year omplete this particulous before stributions	ear in the base per rt. making any entrie Net value of noi	s. (c) ncharita	able-use asset	0.	Distrit (col. (b) div	(d) button ratio vided by col. (c)) • 058152
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Was the fou If "Yes," the 1 Enter the Calendar 2 Total of 3 Average the foun 4 Enter the 5 Multiply	940(d)(2) applies, leave to indation liable for the section foundation does not quate appropriate amount in (a) Base period years year (or tax year beginning 2008 2007 2006 2005 2004 Iline 1, column (d) distribution ratio for the dation has been in existe the net value of noncharital line 4 by line 3	his part blank. Ition 4942 tax on the distributable an lify under section 4940(e). Do not collect column for each year, see instruction (b) Adjusted qualifying distributed qualifyin	mount of any year omplete this paructions before stributions $52,024$. $70,352$. $35,847$. $36,898$. $37,181$.	ear in the base per rt. making any entrie Net value of noi	s. (c) ncharita 12, 13, 10, 9,	able-use asset 932,01 484,71 630,85 249,27 157,86	0. 7. 5. 0. 2.	(col. (b) div	(d) putton ratio vided by col. (c)) . 058152 . 049712 . 047395 . 052642 . 049922 . 257823 . 051565 . 1,832,811. 610,159.
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Was the found for Yes, the Tenter the Calendar Tenter the Calendar Tenter the Calendar Tenter the found the found the found the found the Calendar Tenter Tenter the Calendar Tenter	940(d)(2) applies, leave to indation liable for the section foundation does not quate appropriate amount in (a) Base period years year (or tax year beginning 2008 2007 2006 2005 2004 Iline 1, column (d) distribution ratio for the dation has been in existe the net value of noncharital line 4 by line 3	his part blank. Ition 4942 tax on the distributable an lify under section 4940(e). Do not coeach column for each year; see instruction of the column for ea	mount of any year omplete this paructions before stributions $52,024$. $70,352$. $35,847$. $36,898$. $37,181$.	ear in the base per rt. making any entrie Net value of noi	s. (c) ncharita 12, 13, 10, 9,	able-use asset 932,01 484,71 630,85 249,27 157,86	0. 7. 5. 0. 2. 2 3	(col. (b) div	.058152 .049712 .047395 .052642 .049922 .257823 .051565 .1,832,811. .610,159. .5,958.

Form 990-PF (2009) JAMES R. AND BRONNIE L. BRASWELL	73-63397	730	Page 5
Part VII-A Statements Regarding Activities (continued)			
11 At any-time during the year, did the foundation, directly or indirectly, own a controlled entity within the me	eaning of		
section 512(b)(13)? If "Yes," attach schedule (see instructions)		_11	X
12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before	ſ		
August 17, 2008?		12	х
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption a	application?	13 X	1
Website address NONE			
14 The books are in care of ▶ GEORGE L. BOWER, JR.	Telephone no. ► (704) 6	594-5	515
Located at ▶ 300 EAST WADE STREET, WADESBORO, NC	ZIP+4 ▶281		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		1	$\overline{}$
and enter the amount of tax-exempt interest received or accrued during the year	▶ 15]	N/A	_
Part VII-B Statements Regarding Activities for Which Form 4720 May Be			
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	s No
1a During the year did the foundation (either directly or indirectly):	F	 	71.00
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes X No	ļ.	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)	165 🔼 100		
	Yes X No	ŀ	()
a disqualified person?		ļ	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes X No	į	
(5) Transfer any income or assets to a disqualified person (or make any of either available			
for the benefit or use of a disqualified person)?	Yes X No	1	
(6) Agree to pay money or property to a government official? (Exception Check "No"			
ıf the foundation agreed to make a grant to or to employ the official for a period after		į	
termination of government service, if terminating within 90 days.)	Yes X No	Ī	1
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Rej	gulations	.	
section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions	s)? N/A "	1b	
Organizations relying on a current notice regarding disaster assistance check here	►□ ſ		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that	t were not corrected	İ	
before the first day of the tax year beginning in 2009?	[-	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a prival	le operating foundation	.	1.7
defined in section 4942(j)(3) or 4942(j)(5)):	,		14
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII)	for tax year(s) heginging		- ~ ·
before 2009?	Yes X No		
If "Yes," list the years ▶ , ,		- 1	ŀ
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)	1/2) (relating to incorrect		.3.
valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed	39	ić.	18. °
statement - see instructions.)	N/A	75	نــشــا
,	·	2b	+
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here	<i>.</i>		
Do Dod the foundation hold many them 20% development and another to the contract of the contra		ı	1
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			15
during the year?	Yes X No		7
b if "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or	· · · · · · · · · · · · · · · · · · ·	- 1	
May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under	, ,, ,,	- 1	
of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding per			_
Form 4720, to determine if the foundation had excess business holdings in 2009.)	N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would regnardize its charitable nur	20202	As I	ΙX

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that

had not been removed from jeopardy before the first day of the tax year beginning in 2009?

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Form 990-PF (2009) JAMES R. AND BRONNIE L.			73-63397	30 Page 6
Part VII-B Statements Regarding Activities for Which	Form 4/20 May Be I	Required (contin	ued)	
5a During the year did the foundation pay or incur any amount to:				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section		• •	es X No	
(2) Influence the outcome of any specific public election (see section 4955); o	or to carry on, directly or indire		[V]	
any voter registration drive?			es X No	
(3) Provide a grant to an individual for travel, study, or other similar purposes	•	Ye	es X No	
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section		(4 27	
509(a)(1), (2), or (3), or section 4940(d)(2)?		•	es X No	
(5) Provide for any purpose other than religious, charitable, scientific, literary,	, or educational purposes, or f		- I	
the prevention of cruelty to children or animals?		•	es X No	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify un	•	n Regulations		
section 53.4945 or in a current notice regarding disaster assistance (see instru			N/A	5b
Organizations relying on a current notice regarding disaster assistance check t	• • •			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption f		. —		
expenditure responsibility for the grant?		I/A L Ye	es L No	
If "Yes," attach the statement required by Regulations section 53.494	• •			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on			- I. I i j.
a personal benefit contract?		. L Ye	es X No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	personal benefit contract?			6b X
If "Yes" to 6b, file Form 8870.				F 1 : 1 3 + 8
7a At any time during the tax year, was the foundation a party to a prohibited tax s		L Ye	s X No	
b If yes, did the foundation receive any proceeds or have any net income attribut			N/A	7b
Part VIII Information About Officers, Directors, Trust Paid Employees, and Contractors	ees, Foundation Ma	ınagers, Highly	/	
1 List all officers, directors, trustees, foundation managers and their	compensation.			
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
GEORGE L. BOWER, JR.	TRUSTEE			
300 WADE STREET				1
WADESBORO, NC	10.00	0.	0.	0.
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		İ		
	<u> </u>	<u> </u>		
2 Compensation of five highest-paid employees (other than those inc		enter "NONE."	(d) contabilitions to	T () Funance
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e) Expense account, other
NOVE	devoted to position	,,,	compensation	allowances
NONE				
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Total number of other employees paid over \$50,000

Form 990-PF (2009)	JAMES R.	AND BRONN	IE L. B	RASWELL	73-6339730		
Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)							
3 Five highest-paid independent contractors for professional services. If none, enter "NONE."							

•	ighest-paid independent contractors for professional services. If none, enter	"NONE."	
	(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
	NONE		
		7	
			
otal nun	nber of others receiving over \$50,000 for professional services		▶ 0
Part I)	(-A Summary of Direct Charitable Activities		
List the fo	pundation's four largest direct charitable activities during the tax year. Include relevant statist of organizations and other beneficiaries served, conferences convened, research papers prod	ical information such as the	Expenses
	N/A		
-	II/ A		
, ——			
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			1
	Summary of Program-Related Investments		
	the two largest program-related investments made by the foundation during the tax year on	lines 1 and 2.	Amount
		lines 1 and 2.	Amount
	the two largest program-related investments made by the foundation during the tax year on	lines 1 and 2.	Amount
	the two largest program-related investments made by the foundation during the tax year on	lines 1 and 2.	Amount
	the two largest program-related investments made by the foundation during the tax year on	lines 1 and 2.	Amount
	the two largest program-related investments made by the foundation during the tax year on	lines 1 and 2.	Amount
Describe	the two largest program-related investments made by the foundation during the tax year on N/A	lines 1 and 2.	Amount
Describe	the two largest program-related investments made by the foundation during the tax year on	lines 1 and 2.	Amount

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0.

Page 7

Total. Add lines 1 through 3

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndations	s, see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	10,934,584.
b	Average of monthly cash balances	1b	1,050,089.
	Fair market value of all other assets	1c	28,333.
d	Total (add lines 1a, b, and c)	1d	12,013,006.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	12,013,006.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	180,195.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	11,832,811.
6	Minimum Investment return. Enter 5% of line 5	6	591,641.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here and do not complete this part.)	d certain	
1	Minimum investment return from Part X, line 6	1	591,641.
2a	Tax on investment income for 2009 from Part VI, line 5 2a 5,958.		
b	Income tax for 2009. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	5,958.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	585,683.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	585,683.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	585,683.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	712,500.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	712,500.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income. Enter 1% of Part I, line 27b	5	5,958.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	706,542.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of 4940(e) reduction of tax in those years.	ualifies fo	or the section

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Part XIII Undistributed Income (see instructions)

1 Distributable amount for 2009 from Part XI, line 7 228, 965. 585, 683. 228, 965. 501. 3 Excess distributions corryover, if any, to 2009; a From 2004 5 From 2005 6 From 2006 6 From 2007 6 From 2007 6 From 2008 1 Total of lines 3s through e 4 Qualifying distributions for 2009 from Part XII, line 4 Exp. 5 T12, 500; a Applied to 2008, but not more than line 2a Applied to 2008, but not more than line 2a Applied to 2008, but not more than line 2a Applied to 2008, but not more than line 2a Applied to 2008, but not more than line 2a Applied to 2008, but not more than line 2a Applied to 2008, but not more than line 2a Applied to 2009, destributions out of corpus (Riccion required -see instructions) 6 Insert as distributions out of corpus (Riccion required -see instructions) 7 From an instructions converse applied a position of corpus (Riccion required -see instructions) 8 Corpus And time 25 4 c. and 4 Substract line 4 from line 2b Pricry years' (admitted betted more in 5 corpus and time 4b from line 2b from l			(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
2 Undestributed records. Plays, and the seed of 2009 and Earlier amount for 2009 only b Total for prory years. 3 Excess distributions carryover, if any, to 2009: a from 2004 b from 2005 c from 2006 from 2006 c from 2006 d from 2007 e from 2008 from 2008 from 2007 e from 2008 from 2008 from 2007 e from 2008 from 2008 from 2007 e from 2008 from	1					505 602
a Earler amount for 2008 only b Total for prior years: Sexes dishibutions carryover, if any, to 2009: a From 2004 b From 2005 e From 2006 d From 2007 e From 2006 d From 2007 e From 2008 1 Total of Ines Sa through to Part XII, Ine 4 > 5 T12, 5 0.0 a Applied to 2008, but not mure than Ine 2a b Applied to 2008, but not mure than Ine 2a b Applied to 2008, but not mure than Ine 2a b Applied to 2008, but not mure than Ine 2a b Applied to 2008, dust not mure than Ine 2a b Applied to 2008, dust not mure than Ine 2a b Applied to 2008, dust not mure than Ine 2a b Applied to 2008, dust not mure than Ine 2a b Applied to 2008, dust not mure than Ine 2a b Applied to 2008, distributed income to groups (Election required - see instructions) d Fine Inequality of the carrier of the service of		•				303,003.
3 Excess distributions carryover, d'any, to 2009; a From 2006 from 2007 from 2006 from 2007 from 2008 1 Tetat of lines 3a through e 4 Qualifying distributions for 2009 from Part XII, time 4, Ps. 3 T12, 500 a Applied to 2005, but not more than line 2a Applied to 2005, but not more than line 2a Applied to 2005 distributions on of corpus (Election required - see instructions) c Treated as distributions on of corpus (Election required - see instructions) d Applied to 2005 distributions and of corpus (Election required - see instructions) from second register of see instructions) from second register of see instructions from second register of see instructions from second register of see instructions from second register of see instructions from second register of see instructions from second register of see instructions as indicated below. Carpus And tent at of each column as indicated below. To require the amount of prory vears' undistributed mormer, Subtract lines deformed income for 2008. Subtract line da from line 2b C Enter the amount of prory vears' undistributed mormer for which a notice of discinceny has been issued, or on which the section 49(47) tax has been proviously assessed O . Subtract lines 4d and 5 from line 1b. This amount must be distributed in 201 7 Amounts treated as distributions carryover from 204 not applied on line 5 or line 7 O . 9 Excess first butions carryover to 2010. Subtract lines 4d and 5 from line 1a or lines as the section 49(4)(1) or 494(2)(3) 8 Excess first mo 2005 Excess from 2005 Excess from 2005 Excess from 2006 Excess from 2008 Excess from 2008 Excess from 2008 Excess from 2008 Excess from 2008 Excess from 2008 Excess from 2008					228 965	
S Excess distributions carryover, it any, to 2009; a From 2006 From 2006 From 2007 From 2008 I Total of lines 3a through e 4 Qualifying distributions to 2009 from Part XII, line 4 * * * * * * * * * * * * * * * * * *		• • • • • • •			220,303.	
3 Excess distributions carryover, if any, to 2009. a From 2004 b From 2005 c From 2006 d From 2007 e From 2008 1 Total of lines 3a through e 4 Qualifying distributions for 2009 from Part XII, line 4 → ► 71.2 , 5.00 Part XII, line 4 → From 1 line 2 , 5.00 Part XII, line 4 → From 1 line 2 , 5.00 Part XII, line 4 → From 1 line 2 , 5.00 Part XII, line 4 → From 1 line 4 , 5.00 Part XII, line 4 → From 1 line 5 , 5.00 Part XII, line 4 → From 1 line 5 , 5.00 Part XII, line 4 → From 1 line 2 , 5.00 Part XII, line 4 → From 1 line 5 , 5.00 Part XII, line 4 → From 1 line 5 , 5.00 Part XII, line 4 → From 1 line 5 , 5.00 Part XII, line 4 → From 1 line 5 , 5.00 Part XII, line 4 → From 2005 Part XII, line 4 → From 2005 Part XIII, line 4 → From 2006 Part XIII, line 4 → From 2006 Part XIII, line 4 → From 2006 Part XIII, line 4 → From 2006 Part XIII, line 4 → From 2006 Part XIII, line 4 → From 2006 Part XIII, line 4 → From 2006 Part XIII, line 4 → From 2006 Part XIII, line 4 → From 2006 Part XIII, line 4 → From 2006 Part XIII, line 4 → From 2006 Part XIII, line 4 → From 2006 Part XIII, line 4 → From 2006 Part XIII, line 4 → From 2006 Part XIII, line 4 → From 2006 Part XIII, line 4 → From 2006 Part	U	Total for prior years.				
a From 2004 b From 2006 d From 2007 e From 2006 d From 2007 e From 2008 1 Total to lines 3s through e 1 Outlifying distributions for 2009 from Part XII, time 4: ▶ \$ 71.2 , 50.0 a Applied to 2008, but not more than line 2a b Applied to 2008 but not more than line 2a b Applied to 2008 distributible amount e Remaining amount distributed out of corpus (Election required - see instructions) 5 Excess distributions out of corpus (Election required - see instructions) 6 Enter the net total of each column as indicate below: and to see them contained (a) 7 Phorey reses' undestributed income. Subtract line 4 from line 23 6 Enter the amount of prer years' condictable the section of the see that the see	2	Excess distributions carryover if any to 2009:				
b From 2005 e From 2006 d From 2007 e From 2008 1 Total of lines 32 through e 4 Qualifying distributions for 2008 from Part XII, line 4: \$ \$ 7.2,500. Applied to 2009, but not more than line 2s Applied to 2009, but not more than line 2s Applied to 2009, but not more than line 2s Applied to 2009 distributable amount e Remaillang amount distributed income of prior years (Election required -see instructions) d Applied to 2009 distributable amount e Remaillang amount distributed out of corpus (Election required -see instructions) d Applied to 2009 distributable amount e Remaillang amount distributed out of corpus (Election required -see instructions) d Applied to 2009 distributable amount e Remaillang amount distributed out of corpus (Election required -see instructions) d Applied to 2009 distributable amount e Remaillang amount distributed out of corpus (Election required -see instructions) d Applied to 2009 distributable amount e Remaillang amount distributed out of corpus (Election Flee List and the Subtrated to 2009 mattis seriors in cations (all in the same amount as indicated below: 3 Corpus Add lines 3t, for, and 46 Subtrated line 4 bit from line 2 h distributed income for 2008. Subtract line 4 bit from line 6. Taxable amount - see instructions Q . Q . Q . Q . Q . Q . Q . Q		ı				
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Part XIV Private Operating F	oundations (see ins	structions and Part VII	-A, question 9)	N/A	
1 a If the foundation has received a ruling of	r determination letter that	it is a private operating			
foundation, and the ruling is effective for	r 2009, enter the date of t	he ruling	•		
b Check box to indicate whether the found	lation is a private operatir	ig foundation described i	n section	4942(j)(3) or 49	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
investment return from Part X for					
each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII,					
line 4 for each year listed					
d Amounts included in line 2c not					
used directly for active conduct of					
exempt activities				ŀ	
e Qualifying distributions made directly					
for active conduct of exempt activities.					
Subtract line 2d from line 2c Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from					
an exempt organization					
(4) Gross investment income				1	
Part XV Supplementary Info			if the foundation	n had \$5,000 or m	ore in assets
at any time during t	ne year-see the i	instructions.)			
Information Regarding Foundation List any managers of the foundation wh year (but only if they have contributed in NONE	o have contributed more		ributions received by the	e foundation before the clo	se of any tax
b List any managers of the foundation wh other entity) of which the foundation has			or an equally large port	on of the ownership of a p	artnership or
NONE					
2 Information Regarding Contribute Check here ► X if the foundation of the foundation makes gifts, grants, etc.	only makes contributions t	to preselected charitable	organizations and does	not accept unsolicited requ omplete items 2a, b, c, and	ests for funds. If
a The name, address, and telephone num	ber of the person to whor	n applications should be	addressed:	·	
GEORGE L. BOWER, JR. THE WYATT HOUSE, 300	, POISSON,	POISSON, B	OWER & CLO	DFELTER 8170	
b The form in which applications should b					
c Any submission deadlines:					
d Any restrictions or limitations on awards	s such as hy gengraphic	al areas, charitable fields	kinds of institutions or	other factors:	
- 7 mg 1992 1990 1990 1991 1991 1991 1991 1991	,, Jaon as by geograpille	vuo, viiai impie neius,	minus of mantations, Of	varoi 1001013.	

3 Grants and Contributions Paid During the Ye	ar or Approved for Future	Payment		
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
a Paid during the year	or šubstantial contributor	recipient		
SEE STATEMENT 7				
Total			▶ 3a	712,500.
NONE				
Total			25	

Part XVI-A	Analysis of Income-	Producina	Activities
	randiyolo or moonilo		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,

Enter gross amounts unless otherwise indicated.	Unrelate	ed business income	Exclu	ded by section 512, 513, or 514	(e)
•	(a) Business	(b) Amount	(C) Exclu- sion	(d) Amount	Related or exempt function income
1 Program service revenue:	code		code	731104111	
a	ļ				
b					
C	ļ		<u> </u>		
d					
e			<u> </u>		
f			_		
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments			14	57,892.	
4 Dividends and interest from securities			14		
5 Net rental income or (loss) from real estate:	· · · · · ·				
a Debt-financed property					
b Not debt-financed property		7	-		
6 Net rental income or (loss) from personal			├		
			1		
property			 		
7 Other investment income	· · ·		 		
8 Gain or (loss) from sales of assets other			١.,	245 602	
than inventory			18	345,683.	
9 Net income or (loss) from special events			<u> </u>		***
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:			ł		
a					
b					
c					
d					
е					
12 Subtotal. Add columns (b), (d), and (e)		0.		664,957.	0.
13 Total. Add line 12, columns (b), (d), and (e)			•	13	664,957.
(See worksheet in line 13 instructions to verify calculations.)		• •		· —	
	Abo Aco			4 D	
Part XVI-B Relationship of Activities to	tne Acc	omplishment of Ex	emp	t Purposes	
Line No. Explain below how each activity for which incom	ne is reported	in column (e) of Part XVI-A	contrib	outed importantly to the accord	nnlishment of
the foundation's exempt purposes (other than b	y providing fu	inds for such purposes).	Jonan	rated imperiumay to the accom	ipiloninicité of
	•				
					
		 			
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		·			
					
					·-··
		· 		· · · · · · · · · · · · · · · · · · ·	
				·	
			_		

Pá	art X\	Information Re Exempt Organ		s To a	and Transactions a	nd Relationsh	nips With Nonc	haritable	9	
1	Did th	e organization directly or indir	ectly engage in any of the	followin	g with any other organizatio	n described in section	on 501(c) of	T	Yes	No
		ode (other than section 501(c)					`,	<u> </u>		
а		fers from the reporting founda			_			1		
		1) Cash								X
	• •	ther accets		• • •			•	1a(1) 1a(2)	\vdash	X
	• •	transactions:	• •				•	14(2)	\vdash	
υ			hla avamet araanization					11/43		X
	٠,	ales of assets to a noncharital						1b(1)		
		urchases of assets from a nor		zation			•	1b(2)		X
		iental of facilities, equipment,	or other assets		•			1b(3)		X
	(4) R	leimbursement arrangements						1b(4)	$oxed{oxed}$	Х
	(5) L	oans or loan guarantees		-		•		1b(5)	$oxed{L}$	X
	(6) P	erformance of services or me	mbership or fundraising s	olicitatio	ns			1b(6)		X
C	Sharır	ng of facilities, equipment, ma	ılıng lısts, other assets, or	paid em	ployees			1c		X
d	I If the	answer to any of the above is	"Yes," complete the follow	ing sche	dule. Column (b) should alw	vays show the fair m	arket value of the good	ds, other ass	ets,	
	or ser	vices given by the reporting fo	oundation. If the foundatio	n receiv	ed less than fair market valu	e in any transaction	or sharing arrangemer	nt, show in		
		nn (d) the value of the goods,				•				
(a)	Line no	(b) Amount involved			e exempt organization	(d) Description	of transfers, transactions,	and sharing ar	rangeme	ents
	**		<u> </u>	N/A		1 1		.		
				,						
						 				
_					· · · · · · · · · · · · · · · · · · ·					
						 				
					····					
						1				
										
						<u> </u>			-	
2 2	Ic the	foundation directly or indirect	ly affiliated with or related	to one	or more tay-evernat organiz	rations described				
		tion 501(c) of the Code (other	·		· · · · · · · · · · · · · · · · · · ·	Adon's described			Γ¥	No
		, .		// III 3661	1011 327	•	•	Yes	11	טאו ר
L	11 163	s,* complete the following scho (a) Name of org			(b) Type of organization		c) Description of relation	onchin		—
			amzadon		(b) Type of organization		c) bescription of relativ			
		N/A								
								·		
_							 			
- 1		enalties of perjury, I declare that I h plete Declaration of preparer (othe					my knowledge and belief,	it is true, corre	ict,	
	2.2 0011	416	A	011						
	_	TRUSTEE								
2	Si	gnature of officer or trustee	1		Date	Title				
֡֓֞֞֜֞֜֜֞֜֜֞֜֜֜֡֡֜֞֜֜֜֡֓֓֓֡֜֜֡֜֡֡		Preparer's Date Check if						parer's identif	ying num	nber
	Paid Preparer's Use Only	signature	Jama !!		ender 10	2/09/10 self	ployed >			
"	Paid pare	Firm's name (or yours GREE	R & WALKER,	LLP			EIN ►			
	Tep Jse		SOUTH TRYON		STE 1500					
	ر ہ		LOTTE, NC 28				Phone no. (70	4) 37	7-0	239
_		Cimin					1. 110110 110. (/ 0	-, -,	<u>· </u>	

FORM 990-PF INTEREST ON SAVI	NGS AND TEM	PORARY CAS	H INVESTMENTS	S STATEMENT 1
SOURCE				AMOUNT
ANSON BANK FIDELITY INVESTMENTS SUNTRUST BANK				7,320. 50,000. 572.
TOTAL TO FORM 990-PF, PART I,	LINE 3, CO	LUMN A		57,892.
FORM 990-PF DIVIDEND	S AND INTER	EST FROM S	ECURITIES	STATEMENT 2
SOURCE	GROSS	AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
FIDELITY INVESTMENTS FIDELITY INVESTMENTS-NON		308,970.	55,532.	253,438.
DIVIDEND DIST. FIDELITY INVESTMENTS-TAX EXEM	IPT	5,515. 2,429.	0. 0.	•
TOTAL TO FM 990-PF, PART I, L	N 4	316,914.	55,532.	261,382.
FORM 990-PF	ACCOUNTI	NG FEES		STATEMENT 3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVES MENT INCO	-	
ACCOUNTING FEES	4,550.	-	0.	0.
TO FORM 990-PF, PG 1, LN 16B	4,550.		0.	0.
FORM 990-PF C	THER PROFES	SIONAL FEE	5	STATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVES' MENT INCO		
COURT FEES INVESTMENT FEES BANKING & OTHER FEES INSURANCE	20. 57,219. 254. 303.	57,2: 2	0. 19. 54.	0. 0. 0.
TO FORM 990-PF, PG 1, LN 16C	57,796.	·		0.

FORM 990-PF	TAXES			STATEMENT 5		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVE MENT INC		(C) ADJUSTED NET INCOM		
REAL ESTATE TAXES FOREIGN TAXES	505 2,934		505. 934.		0.	
TO FORM 990-PF, PG 1, LN 18	3,439	3,	439.		0.	
FORM 990-PF	OTHER IN	VESTMENTS			STATEMENT 6	
DESCRIPTION		ALUATION METHOD	вос	K VALUE	FAIR MARKET VALUE	
FIDELITY INVESTMENT ACCOUNT	_	COST	11	,246,961.	11,985,014.	
TOTAL TO FORM 990-PF, PART I	I, LINE 13		11	,246,961.	11,985,014.	

FORM 990-PF

STATEMENT 7

	DURING THE YEAR	SIAI	
RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
WINGATE UNITED METHODIST CHURCH 111 RUNVILLE RD. WINGATE, NC 28174	SUPPORT CHARITABLE ACTIVITIES OF CHURCH	RELIGIOUS ORG.	70,000.
UNION COUNTY HABITAT FOR HUMANITY 104 S. HAYNES ST. MONROE, NC 28112	HOUSING FOR DISADVANTAGED	PUBLIC CHARITY	70,000.
AMERICAN RED CROSS-UNION COUNTY CHAPTER 608 E. FRANKLIN STREET MONROE, NC 28112	CRISIS MINISTRY	PUBLIC CHARITY	50,000.
AMERICAN BIBLE SOCIETY 1865 BROADWAY NEW YORK, NY 100237505	RELIGIOUS MISSIONS	RELIGIOUS ORG.	30,000.
LOVE'S GROVE METHODIST CHURCH 4360 POLK FORD ROAD STANFIELD, NC 28163	RELIGIOUS MISSIONS	RELIGIOUS ORG.	30,000.
WINGATE UNIVERSITY P.O. BOX 159 WINGATE, NC 28174	ANNUAL FUND	EDUCATION FACILITY	30,000.
HEALTHQUEST OF UNION COUNTY 412 EAST FRANKLIN STREET MONROE, NC 28105	MEDICAL ASSISTANCE FOR DISADVANTAGED	PUBLIC CHARITY	50,000.
HOSPICE OF UNION COUNTY 700 W. ROOSEVELT BOULEVARD MONROE, NC 28110	CARE OF TERMINALLY ILL	PUBLIC CHARITY	50,000.

GRANTS AND CONTRIBUTIONS

JAMES R. AND BRONNIE L. BRASWEI	L ,		73-6339730
TURNING POINT 1501 CHARLOTTE AVE. MONROE, NC 28105	SHELTER FOR BATTERED WOMEN	PUBLIC CHARITY	50,000.
UNION COUNTY CRISIS ASSISTANCE 116 E FRANKLIN ST. MONROE, NC	EMERGENCY COUNCELING	PUBLIC CHARITY	20,000.
	SOCIAL SERVICES TO FAMILIES	PUBLIC CHARITY	30,000.
ANSON CRISIS MINISTRY 117 N. RUTHERFOD ST. WADESBORO, NC 28170	EMERGENCY FOOD ASSISTANCE	PUBLIC CHARITY	10,000.
WYCLIFF BIBLE TRANSLATIONS P.O. BOX 628200 ORLANDO, FL 32832	RELIGIOUS MISSIONS	PUBLIC CHARITY	20,000.
	SERVICES FOR OLDER ADULTS IN UNION COUNTY	PUBLIC CHARITY	40,000.
UNION SYMPHONY SOCIETY P.O. BOX 3044 MONROE, NC 28111	PERFORMING MUSCIAL ARTS	PUBLIC CHARITY	2,500.
CHARLOTTE RESCUE MISSION 6321 ALBEMARLE ROAD CHARLOTTE, NC 28204	EMERGENCY FOOD ASSISTANCE	PUBLIC CHARITY	15,000.
CENTER GROVE METHODIST CHURCH CABARRUS COUNTY RUTHERFORD, NC	RELIGIOUS MISSIONS	RELIGIOUS ORG.	30,000.
UNITED WAY OF CENTRAL CAROLINA'S 117 S. GREEN STREET WADESBORO, NC 28170	UMBRELLA CHARITABLE ORGANIZATION	PUBLIC CHARITY	10,000.

JAMES R. AND BRONNIE L. BRASWELL	L		73-6339730
KATAWBA VALLEY LAND TRUST 106 EAST MEETING STEET LANCASTER, SC 29720	LAND CONSERVATION	PUBLIC CHARITY	5,000.
SOUTH PEIDMONT COMMUNITY COLLEGE 4209 OLD CHARLOTTE, NWY MONROE, NC 28110	ANNUAL FUND	EDUCATION FACILITY	100,000.
TOTAL TO FORM 990-PF, PART XV, LI	NE 3A		712,500.

Greer & Walker Investment Advisors, LLC REALIZED GAINS AND LOSSES GEORGE C BOWER JR TTEE JAMES & BRONNIE BRASWELL TR U/A 08/02/01 From 01-01-09 Through 12-31-09

Open	Close		Cost		Short Term	Long Term
Date	Date	Security	Basis	Proceeds	Gain Or Loss	Gain Or Loss
8/5/2005	3/17/2009	Fidelity Govt Secs Fund	98,000.00	103,620.97		5,620.97
9/15/2005	3/17/2009	Fidelity Govt Secs Fund	139,450.98	146,379.03		6,928.05
9/15/2005	3/23/2009	Fidelity Govt Secs Fund	60,549.02	64,206.90		3,657.88
9/19/2005	3/23/2009	Fidelity Govt Secs Fund	100,000.00	106,041.19		6,041.19
9/21/2005	3/23/2009	Fidelity Govt Secs Fund	100,000.00	105,945.05		5,945.05
9/23/2005	3/23/2009	Fidelity Govt Secs Fund	100,000.00	106,233.99		6,233.99
9/26/2005	3/23/2009	Fidelity Govt Secs Fund	110,572.88	117,572.87		6,999.99
9/26/2005	3/26/2009	Fidelity Govt Secs Fund	14,427.12	15,340.45		913.33
10/3/2005	3/26/2009	Fidelity Govt Secs Fund	125,000.00	133,520.79		8,520.79
10/13/2005	3/26/2009	Fidelity Govt Secs Fund	100,000.00	107,208.62		7,208.62
10/20/2005	3/26/2009	Fidelity Govt Secs Fund	50,000.00	53,555.17		3,555.17
11/2/2005	3/26/2009	Fidelity Govt Secs Fund	150,000.00	161,703.02		11,703.02
11/3/2005	3/26/2009	Fidelity Govt Secs Fund	26,547.78	28,671.95		2,124.17
11/3/2005	4/1/2009	Fidelity Govt Secs Fund	149,452.22	162,004.28		12,552.06
12/8/2005	4/1/2009	Fidelity Govt Secs Fund	100,000.00	107,701.93		7,701.93
12/12/2005	4/1/2009	Fidelity Govt Secs Fund	28,049.95	30,293.79		2,243.84
12/12/2005	4/6/2009	Fidelity Govt Secs Fund	171,950.05	184,343.40		12,393.35
12/13/2005	4/6/2009	Fidelity Govt Secs Fund	107,881.05	115,656.60		7,775.55
12/13/2005	4/24/2009	Fidelity Govt Secs Fund	52,118.95	55,823.85		3,704.90
5/1/2006	4/24/2009	Fidelity Govt Secs Fund	325,000.00	355,634.59		30,634.59
5/15/2006	4/24/2009	Fidelity Govt Secs Fund	80,838.41	88,541.56		7,703.15
6/30/2008	10/9/2009	Fidelity Tax-Free Money	100,000.00	100,000.00		· •
6/30/2008	11/5/2009	Fidelity Tax-Free Money	200,000.00	200,000.00		-
TOTAL GAINS			2,489,838.41	2,650,000.00	0	160,161.59

TOTAL REALIZED GAIN/LOSS 160,161.59